Fort Washington
Private Client Group
A member of Western & Southern Financial Group

ORGANIZATIONAL HIGHLIGHTS

Parent company:

Western & Southern Financial Group

- *Fortune* 500 Company
- Anchor investor in all Fort Washington strategies

Signatory of:

PRI Principles for Responsible Investment

Ranked #6

In *FA Magazine's* 2021 RIA Ranking[2]

Western & Southern Financial Group Support

2021 Total Donations and Sponsorships[3]

- Major Events
- Human Services
- Education
- The Arts
- Health Care
- Our Community

300+
Charities Supported

$70 million
to Local Economy

FORT WASHINGTON PRIVATE CLIENT GROUP OVERVIEW

WHO WE ARE

The Private Client Group is a team of wealth planners, portfolio managers, and relationship managers dedicated to proactively developing strategies to help our clients work toward achieving their goals. Using our breadth of expertise in wealth planning and portfolio management, as well as our in-depth perspective on a variety of investment markets, we take a thorough approach when evaluating your unique needs. As a fiduciary, we act with the utmost integrity and always have your best interest in mind.

Mission / Our mission is to enrich our clients with attractive investment returns, proactive and strategic financial advice, decisive action, and a commitment to excellence.

Promise / We strive to always go beyond what's expected.

At a Glance

1990

Registered Investment Advisor since 1990[1]

Headquarters in Cincinnati, Ohio

Credentialed team of advisors and planners (CFP®, CFA, CAIA professionals)

Committed to outstanding client service

Collaborative approach to long-term investing

WHY FORT WASHINGTON

- We are a fiduciary, putting your best interest at the heart of every decision we make and every action we take.
- Our client teams include wealth planners, portfolio managers, and relationship managers.
- Our client teams have an average of 23+ years of experience in the industry.
- We utilize goals-based wealth planning to focus on and prioritize what is important to you.
- We exercise proprietary risk management techniques.
- We customize our investment approach to help meet your individual needs.
- Our advisory fees are straightforward and simple.
- We collaborate with your other valued advisors, including attorneys and tax professionals.

Client priorities and goals are at the center of every decision we make.

Using a personalized planning process that centers on a deep understanding of your needs, we provide tailored wealth management services to help you connect your purpose with your financial life. Our focus is to help you get the most out of life, and we work hard to do what's right for you.

We are your guide through the many facets of the wealth planning process.

Some services listed may be performed by third parties who may or may not be affiliated with Fort Washington Investment Advisors, Inc.

Achieving your goals is our benchmark.

WE CAN HELP. CONNECT WITH AN EXPERT TODAY.

privateclientgroup@fortwashington.com / 513.361.7929

1 Registration as an investment advisor does not imply any level of skill or training.
2 Ranking by Financial Advisor Magazine is based on discretionary and nondiscretionary AUM reported on Form ADV as of 12/31/2020.
3 Categories of causes and needs supported in 2021 by Western & Southern, its corporate foundation, associates, charitable fundraising campaigns and community sponsorships.

Fort Washington does not provide tax advice nor is an expert in tax law.

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