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

Pensions&Investments BEST PLACES TO WORK IN MONEY MANAGEMENT 2019 MULTIYEAR WINNER 2013 2014 2016 2017 2018

Western & Southern Financial Group Support

2019 Total Donations and Sponsorships[2]

- Economic Development
- Healthcare
- Human Services
- Education
- The Arts
- 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 advisors, 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

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Collaborative approach to long-term investing

HOW WE'RE DIFFERENT

- 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 advisors, portfolio managers, wealth planners, and relationship managers.
- Our client teams have an average of 20+ 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 meet your individual needs.
- Our 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.

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 Categories of causes and needs supported in 2019 by Western & Southern's corporate foundation, associates, charitable fundraising campaigns and community sponsorships.

Best Places to Work rankings are determined in conjunction with third-party surveys of employers and employees.

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

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