Fort Washington
Private Client Group

A member of Western & Southern Financial Group

ORGANIZATIONAL HIGHLIGHTS

Parent company:

Western & Southern Financial Group

- *Fortune* 500 Company[1]
- Anchor investor in all Fort Washington strategies

Signatory of:

PRI Principles for Responsible Investment

Western & Southern Financial Group Support

2025 Total Donations and Sponsorships[2]

728
Organizations Supported

$37.5 billion
Community Impact Since 2008

$136+ million
to Local Economy

$10.9 million
Raised since 2007

$1.2 million
Donated in 2025

$700,000+
Raised for local foodbank in 2025

FORT WASHINGTON PRIVATE CLIENT GROUP OVERVIEW

WHO WE ARE

Fort Washington's Private Client Group brings together experienced wealth planners, portfolio managers, and relationship managers to develop personalized strategies that help clients achieve their financial goals. Drawing on our expertise in wealth planning and portfolio management, along with our broad perspective across investment markets, we take a comprehensive approach to understanding each client's unique needs. As a fiduciary, we are committed to acting in our clients' best interests.

Mission / Our mission is to help our clients achieve their goals through 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[3]

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

WHY FORT WASHINGTON

- As a fiduciary, we place your best interests at the center of every decision and action.
- Our client teams include wealth planners, portfolio managers, and relationship managers.
- Our client team members have an average of 22 years of industry experience.
- We take a goals-based approach to wealth planning, aligning your financial strategy with what matters most to you.
- We employ proprietary risk management techniques to evaluate and manage investment risks.
- We customize our investment approach to help meet your individual needs.
- We offer a straightforward, transparent advisory fee structure.
- We collaborate with your other trusted advisors, including attorneys and tax professionals.

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

Through a personalized planning process grounded in a thorough understanding of your needs and priorities, we provide tailored wealth management services that align your goals with your financial strategy. Our collaborative approach brings together wealth planning and investment management expertise to help you navigate financial decisions with confidence.

Our team works to bring together every aspect of your financial life.



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

Helping Investors Reach Their Goals.

WE CAN HELP. CONNECT WITH AN EXPERT TODAY.

fortwashington.com / 513.361.7929

Fort Washington is a signatory of the U.N.-sponsored Principles for Responsible Investment. The firm uses a comprehensive risk management program that includes a thorough assessment of ESG factors and conducts proprietary ESG research.

1 Fortune and Fortune 500 ® are registered trademarks of Fortune Media IP Limited and are used under license. Fortune and Fortune Media IP Limited are not affiliated with, and do not endorse the products or services of Western & Southern Financial Group.
2 Categories of causes and needs supported in 2025 by Western & Southern, its corporate foundation, associates, charitable fundraising campaigns and community sponsorships.
3 Registration as an investment advisor does not imply any level of skill or training.

Fort Washington does not provide tax advice and is not an expert in tax law.

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