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Financial Management Group named national wealth management leader

Contributed By: [M Zemper](#) | Oak Tree Communications, LLC

Financial Management Group (FMG), an independent, fee-only wealth management company in Blue Ash, is ranked a top company in assets managed nationwide by Financial Advisor magazine's 2013 RIA survey.

FMG manages client assets of \$254 million and placed #324 in the national listing of 552 registered investment advisors.

The firm reported excellent growth metrics from 2011 to 2012: a 29 percent growth in assets; 18.95 percent average annual growth in assets per clients; and an almost 9 percent growth in its client base.

"We are grateful to have clients who spread the word and enable us to rank on the list every year," said Dave Wilder of Mariemont, FMG chief investment officer. "We've come a long way since 2001, when we first appeared on the list. We're beginning to see more financial management services companies act as fiduciaries and join the ranks of fee-only, rather than fee-based financial services companies."

Eleven other Cincinnati financial management firms made the national RIA listing: Riverpoint Capital Management; Johnson Investment Counsel; Bahl and Gaynor; Bartlett and Company; Truepoint; Foster and Motley; Lenox Wealth Management; Wealthquest Corporation; Madison Wealth Management; Horter Investment Management; and Berno Financial Management.

Financial Advisor magazine has a circulation of 100,000 financial planners, registered investment advisors and independent broker-dealers registered with the Securities and Exchange Commission. Purpose of the national listing is to recognize successful wealth management companies who are registered investment advisors.

The magazine reported that the registered investment advisor community seems to be moving toward a fee-only model. Nine firms on the RIA list reported asset growth of 100 percent, with 336 firms reporting double-digit growth.

Financial Management Group is a 24-year-old, financial planning and investment management company passionate about serving clients in a fiduciary manner. The company sells no financial products for either fee-based or commission compensation.

The company has been listed a "Top Wealth Manager" by Wealth Manager magazine each year since 2001.

FMG has built its philosophy of investing around the concept of saving in a disciplined manner over time and investing wisely. Company founder and CEO Brett Wilder outlined this philosophy and strategy in 2008 in a highly-acclaimed book titled, *The Quiet Millionaire*. Wilder has more than 40 years of experience as a comprehensive wealth manager.

Financial Management Group is located at 4665 Cornell Road, Suite 160, in Blue Ash. For more information about FMG, go to www.fmgonline.com or call (513) 984-6696.



From left are Financial Management Group's Rob Siegmann, chief operating officer; Dave Wilder, chief investment officer; and Rob Lemmons, financial planning director. (Photo Provided)