

## Chip Workman, MBA Lead Advisor

### *Providing individuals with financial and emotional security*

As Lead Advisor for Cincinnati-based The Asset Advisory Group, Chip Workman, MBA, specializes in providing comprehensive financial planning services to a select clientele. As a fee-only advisor, Chip does not accept commissions or third-party compensation of any kind. This means he is totally independent and can offer professional investment advice *without* any outside influences or proprietary sales agenda. The firm is an SEC Registered Investment Advisor and wealth management firm; within that framework Chip specializes in providing retirement income planning services and independent advice. Before joining The Asset Advisory Group in 2008, Chip enjoyed a well-established career in Private Banking, advising high net worth clients on a variety of personal financial issues.

Born and raised in Cincinnati, Chip completed his undergraduate studies at Miami University prior to earning his MBA at Xavier University. A member in good standing of the international Financial Planning Association (FPA), Chip participates in financial literacy projects through his local FPA chapter.

Chip is actively involved with Children's International Summer Villages (CISV), serving as the Finance Director for the National Board as well as Vice President of Financial Development for the Cincinnati chapter. He serves as a mentor through Xavier University's Executive Mentor Program at the Williams College of Business and is active in various young professional organizations in the area. Chip lives in West Chester with his wife, Abby, where they focus their time on their philanthropic efforts, spending time with friends, and raising their active, school-aged daughter.



#### **Areas of Expertise**

- Comprehensive Financial Planning
- Independent Investment Advice
- Retirement Income Planning

#### **Education/Certification**

- B.A., Miami University
- MBA, Xavier University

#### **Featured in Publications**

- *Cincinnati Business Courier*
- *Soapbox Cincinnati*

#### **Boards/Organizations**

- Finance Director, CISV USA
- VP Financial Development, CISV Cincinnati
- Xavier University Executive Mentor Program
- Financial Planning Association
- Theta Chi Alumni Association
- Summit Country Day Alumni Association



4600 McAuley Place, Suite 140, Cincinnati, OH 45242 • (513) 771-7222 • (888) 234-7982

**Learn more at [www.taaginc.com](http://www.taaginc.com)**