

Chip Workman, CFP[®], MBA Lead Advisor

Providing individuals with financial and emotional security

As Lead Advisor for Cincinnati-based The Asset Advisory Group, Chip Workman, CFP[®], 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. After successfully completing the educational and experience components (as set forth by the CFP[®] Board of Standards) through the Terry College of Business at the University of Georgia, he passed a rigorous certification examination and is correspondingly authorized to use the CFP[®] mark of distinction. Chip is a member in good standing of the Financial Planning Association (FPA) and participates in financial literacy projects through the Accounting for Kids program in Cincinnati.

Chip is actively involved with Children's International Summer Villages (CISV), serving as Chairman of the Finance Committee for the National Board as well as Vice President of Finance & 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 young daughter.

CFP[®] and CERTIFIED FINANCIAL PLANNER[™] professional are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.



Areas of Expertise

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

Education/Certification

- B.A., Miami University
- MBA, Xavier University
- CFP[®] mark, University of Georgia

Featured in Publications

- *Cincinnati Business Courier*
- *Soapbox Cincinnati*

Boards/Organizations

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

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