

FINANCIAL INDEPENDENCE DOESN'T HAVE TO BE A DREAM.

Financial independence is a vision we all share.

Ruggaard & Associates, Inc. provides holistic, personalized services to help you meet your financial goals and dreams. No matter where you are in life you build a secure and independent future.

Meet with us



Read More

Trust Skill Integrity

Founded in 1993, Ruggaard & Associates, Inc. offers fee-only financial planning, investment management and tax services with time-trusted experience, knowledge and a comprehensive approach. This is The Ruggaard Difference.



Our mission is to help our clients become financially independent by offering complete services from financial planning to investment management and tax services, paired with our core beliefs – trust, skill and integrity. We do this in a fee-only, collaborative environment, fine-tuned to each of our client's individual goals. Let us take you on your financial independence journey.







Retirement Plan Management



Tax Services

THE PROCESS

Financial Planning

Investment Management





Discovery & Engagement

Starting with a free, introductory meeting, we work with you to identify and assess your personal objectives, and financial goals are established. Through our customized approach and planning, you will begin to understand how we help you move toward financial independence. As Registered Investment Advisors, our fiduciary responsibility is to serve our client's interests first and provide a transparent, fee-only service model. Our clients value our advice.

Employee Benefits:	•
Retirement:	•
Estate:	•
Education:	•
Tax Planning:	•
Insurance:	





recommendations for your goals, backed by more than 25 years of experience.

Plan Presentation: With our customized approach, our investment team develops a plan for your financial goals. The plan is presented and discussed with each client to begin the path to financial independence.



After your detailed analysis is complete and we have agreed on services and recommendations, your investment team will focus on coordinating all aspects of your plan. Accountability for new financial independence is our top priority.



Change is a constant in our lives, whether it is personal or economic. These changes may impact your financial independence and this is where your partnership with Ruggaard & Associates, Inc. is most important. With trust, skill and integrity, we handle constant change f



OUR TEAM

Investment Management Team

Tax Services Team

Administrative Team





Randy Ruggaard, CPA, CFP® PRESIDENT



Aaron Seil, CFA®

CO-PORTFOLIO MANAGER



John D. May III, CFP®
FINANCIAL ADVISOR

Experience The Ruggaard Difference



Sign up here.

NAME (REQUIRED)

EMAIL (REQUIRED)

Send



TAKE THE FIRST STEP TOWARDS REALIZING YOUR DREAMS.

CONTACT US

Schedule Online

... or leave a message with your information below.

NAME (REQUIRED)

EMAIL (REQUIRED)



Send

LOCATION

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2196 East Enterprise Parkway

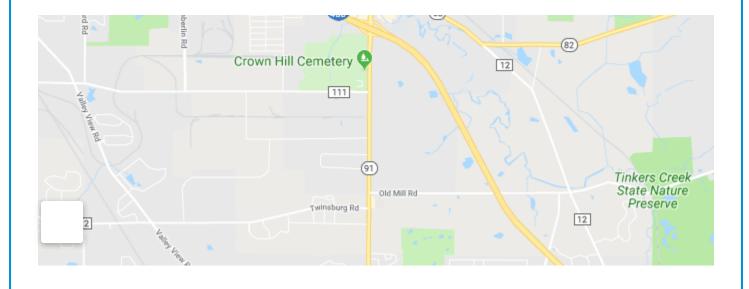
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Ruggaard & Associates, Inc. is a Securities and Exchange Commission Registered Investment Advisor. A copy of Form ADV-Part II is provided to all clients and prospective clients. In addition, the company also maintains notice filings as an investment advisor in Ohio and any other states as required by such jurisdictions.

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