(614) 545-0300

WINDSOR
ADVISORY GROUP

Bringing order to *your* complex financial world.

VIEW OUR APPROACH

Our client-centered services are built on decades of experience, a culture of trust and an uncompromising commitment to providing highly personalized advice.

YOUR FIRST CALL FOR ANY FINANCIAL MATTER

As a privately owned, independent, fee-only advisor, we go beyond traditional wealth management to provide unparalleled focus and commitment on any decisions that impact our clients' financial wellbeing. Equipped with decades of experience, we are well positioned to advise prominent business leaders and high-net-worth clients on all facets of their personal and business-related matters.

With Windsor Advisory Group, you get the best of everything. We're large enough to maintain the systems and expertise of an institutional firm, but small enough to focus on our clients. Our experienced professionals deliver personal CFO-type service that zeroes in on your long-term financial success, bringing clarity and vision to your wealth and goals.

ABOUT WINDSOR

WE EXCEL AT COMPLEXITY

Our analytical, problem-solving approach is well suited to working with families that have complicated financial lives. From owning and operating your own business to establishing trusts, LLCs, S Corps and ESOPs, we embrace the various structures that exist. Our team solves complex problems for our clients – including those you may not think about.

We believe it is our responsibility to simplify your life. Our goal is to make sure that your wealth – and the complexity that typically comes with it – does not create a burden you constantly have to manage.

OUR ADVANTAGE

PROTECTING YOUR WEALTH

Substantial wealth can be acquired in a myriad of ways. Unfortunately, many individuals lack the time required to manage and the knowledge necessary to preserve that wealth for the long run. They often overlook the importance of creating a goal-aligned plan that will help them achieve personal dreams and lifelong stability. While some people are tempted to manage their personal wealth with a corporate mindset, that approach is too short-sighted for most individual goals. It's also a common pitfall for even the savviest business professionals.

At Windsor Advisory Group, we consider it our privilege and responsibility to provide tough-minded financial guidance that is both informed and strategic. This often includes investment alternatives that are designed to provide diversification compared to traditional asset classes.

INVESTMENT PLANS

PARTNERS

Joseph S. Davies, CFA
Partner

Harry M. Dye, III (Trey)
Partner

Jonathon S. Eesley
Partner

John E. Mozola
Partner

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