Call us at (513) 469-8100

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(https://fwag.com)

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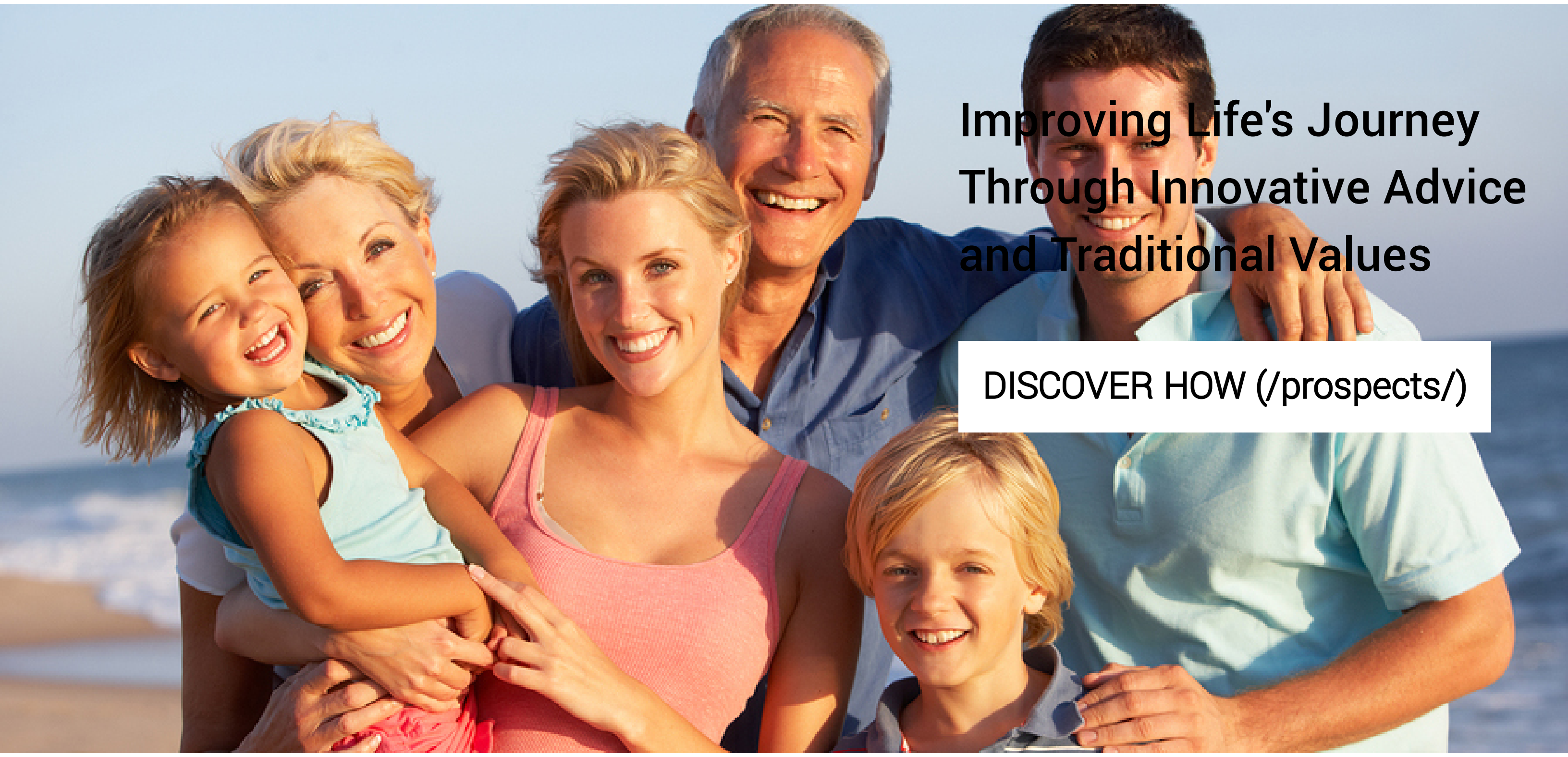

Family Wealth Advisory Group

Family Wealth Advisory Group, LLC is a fee-only financial advisory organization on a mission to continually assist our clients in identifying, utilizing and transferring their family's traditions, wealth and values among current and future generations.

Attitude is Everything

The approach we take with financial planning is very different than what you will find with most financial advisors. Advisors who focus only on the numbers and the money tend to be very formal, serious, and somewhat stuffy. We see financial planning as an emotional, hope-filled endeavor that evokes smiles and laughter. That's not to say that we aren't serious about numbers and money, but we don't feel like working with them should create a roadblock to enjoying your journey…we keep it simple for you. When you walk through our doors, you're greeted like family into a warm and welcome atmosphere that will free you to imagine the possibilities of where your life's journey could take you.

We Focus on the Entire Financial Picture

It's important that you know that not all financial advisors do the same things and most financial advisors aren't able to help you with every aspect of your family's financial life. We can and we do. From budgeting to investing to taxes (yes we do our clients' taxes) to estate planning and planning for every life stage in between, if it affects the financial picture, then we can help with it.

A Client Equals the WHOLE Family

Our clients are always surprised by what's included in our services. It is very rare that a person lives and operates in complete financial isolation. We want to see the entire family unit succeed. When the kids get out of college and get that first job, we sit down with them, go through some basic budgeting, help them with their employee benefits' choices and help them get started on the right path to financial independence. When the parents reach the age where they need their children's assistance due to a variety of reasons, we are there to help them too. We're here to serve the family.

(https://www.cfp.net/) (http://www.plannersearch.org/financial-planner/search/robert-j-grossheim)

(https://findanadvisor.napfa.org/Members.aspx/View/4291/5853)

(https://www.bbb.org/cincinnati/business-reviews/financial-planning-consultants/family-wealth-advisory-group-llc-in-cincinnati-oh-3005795)

513-469-8100
info@fwag.com

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Our Location

7359 E Kemper Rd # A,
Cincinnati, OH 45249

Important Meeting Documents

Directions (https://fwag.com/docs/Directions-to-FWAG-2.pdf)

Planning Documents (https://fwag.com/docs/Helpful_Documents_for_Financial_Planning-2.pdf)

ADV Part 2 (https://fwag.com/wp-content/uploads/2019%2003%2020%20Firm%20Brochure%20-%20Form%2

Privacy Notice (https://fwag.com/docs/FWAG_Exhibit_J_-_Privacy-Notice.pdf)