



## Confidence and clarity for the unpredictable.

Asio, a Latin name for owl, was inspired by our overarching desire to provide wise counsel.

As an employee-owned wealth management firm, we have a personal stake in our clients' success.

We will help you identify and achieve your legacy goals by making the complicated simple.

Welcome to Asio.

Our core values inform everything we do.

## **LISTENING EMPATHY**

We only provide value to our clients if we fully appreciate them as human beings.

## **HUMBLE EXPERTISE**

We are good at what we do, but understand that the wise know they will always be students.

## **FLEXIBLE PERSPECTIVE**

We provide solutions as unique as the people we serve.

## **HARDWORKING SERVICE**

We work tirelessly to help our clients realize their goals.

## **PRINCIPLED AND STEADY**

We believe in staying anchored to long-term values, while markets rise and fall, produces consistent long-term results.

## **ATTENTION TO DETAIL**

Today's information overload can be overwhelming. Discerning important information is critical. We focus on the right data and execute a plan accordingly.

## **INVESTING IN OUR ADVICE**

As an employee-owned firm, we advise our clients with the same philosophies, practices, and decisions that we use in our own portfolios.

## Meet the Team

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## **R. TRACY OSBORNE**

Founder

President and CEO

*"Honest advice isn't always the easy thing to give, but it's always the right thing."*

d: 859.785.4131

e: [tosborne@asiocapital.com](mailto:tosborne@asiocapital.com)



## **JOHN CHESHIRE**

Founder

Chief Investment Officer

*"You should only buy a stock for a client you would put in your own account."*

d: 859.785.4133

e: [jcheshire@asiocapital.com](mailto:jcheshire@asiocapital.com)



## **ERIN HERSHEY SERRATE**

Founder  
Senior Wealth Strategist

*"I focus on building relationships that transcend investment portfolios."*

d: 859.785.4134

e: [eserrate@asiocapital.com](mailto:eserrate@asiocapital.com)



## **RYAN M. GRAY**

Founder  
Senior Wealth Strategist

*"I take pride in guiding clients toward making informed decisions."*

d: 859.785.4132

e: rgray@asiocapital.com



## **CASSANDRA BASLER**

Client Service Coordinator

*"I thoroughly enjoy knowing that I made a difference with our clients."*

d: 859.785.4130

e: [cbasler@asiocapital.com](mailto:cbasler@asiocapital.com)

Let's Talk.





o: 859.785.4130

f: 859.785.4136



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