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Financial Management Group Joins Community Foundation of West Chester-Liberty Investment Managers Circle

Financial Management Group (FMG), an independent, fee-only wealth management company in Blue Ash, has joined the Community Foundation of West Chester-Liberty's family of investment managers.

"We are very pleased to be associated with the West Chester-Liberty foundation,"

said Rob Lemmons of Deerfield Township, director of financial planning and senior advisor at FMG. "We looked for a community foundation partner for a long time that was friendly, inclusive, and interested in forming a strong relationship. We felt the West Chester foundation was the right place for our clients to house their philanthropic assets. It's all about clients giving today and leaving a legacy. It's important to us to stay involved now and after the client is gone."

"We're looking forward to giving back to the community and expanding our community involvement in local events and projects as our firm grows," said Rob Siegmann, FMG chief operating and compliance officer.

FMG has established a charitable fund at the foundation and is encouraging its staff to give, too.

FMG is a sponsor for the 2013 Shamrock Shuffle, which will be held Saturday, March 9 at The Square at Union Centre in West Chester.

MISSION

To place our clients' interests first, to provide comprehensive financial planning and investment management, and to be a premier provider of innovative and timely strategies that ensure every client meets their established lifetime goals and objectives.

Fee  Only

When a donor or nonprofit organization sets up an account with the Community Foundation, FMG will be among three choices available to manage the fund's investment. Two banks are currently listed as partners. FMG is the first independent investment firm to join the foundation's family of investment managers.

"We are proud that the Financial Management Group has joined our list of approved investment managers," said Patti Alderson, Community Foundation board chair and CEO. "FMG is a trusted and experienced group of wealth managers who are passionate about serving their clients and putting the client first. We look forward to working together to best serve the charitable needs and investment goals of their clients and our donors."

Financial Management Group is a 24-year-old, financial planning and investment management company passionate about serving clients in a fiduciary manner. The company advises on a fee-only arrangement and sells no financial products for either fee-based or commission compensation. It has more than \$250 million in assets under management.

The company has been listed a "Top Wealth Manager" by *Wealth Manager* magazine each year since 2001.

FMG has built its philosophy of investing around the concept of saving in a disciplined manner over time and investing wisely. Company founder and CEO Brett Wilder outlined this philosophy and strategy in 2008 in a highly-acclaimed book titled, *The Quiet Millionaire*. Wilder has more than 40 years of experience as a comprehensive wealth manager.

Financial Management Group is located at 4665 Cornell Road, Suite 160, in Blue Ash. For more information about FMG, go to www.fmgonline.com or call (513) 984-6696.

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