Anthony Lewis, MBA, AWMA®, CFP®

Assistant Vice President, Wealth Advisor

Brian serves as primary relationship manager, working with clients on the execution of their comprehensive wealth plan, ensuring their personal objectives are being achieved and goals are within reach. Brian collaborates with other members of the Legacy Trust team to expand our business within defined target markets. Brian also continues to serve as lead portfolio manager over client accounts, including many of the company's key relationships. Brian is a member of the Legacy Trust Investment Team and is responsible for implementing the Legacy Trust investment strategy.

Experience

Legacy Trust, 2018 – present
Fifth Third Private Bank, 2013 – 2018
Johnson Bank, 2012 – 2013
Fidelity Investments, 2009 – 2012
United States Naval Reserves, 1990 - 2006

Certification

Certified Financial Planner ™
Accredited Wealth Management Advisor ℠

Education

B.S.B.A., The Ohio State University
MBA, Grand Valley State University

Community Involvement

The American Legion - Member