Anthony Lewis, MBA, AWMA®, CFP®

Assistant Vice President, Wealth Advisor, Sr. Wealth Planner

Tony is a fiduciary advisor for wealth planning and trust administration. He operated without bias in managing wealth and distrusting trust property, while maintaining you and your beneficiaries' best interest. He has been a CFP® professional for over ten years. The designation comes with extensive training in financial planning, estate planning, insurance, investments, employee benefits, and retirement planning.

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 SM

Education

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

Community Involvement

The American Legion - Member